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ABSTRACT

Created to facilitate the dissemination of information between researchers and the educational community, the Northeast Regional Exchange steering committee has defined needs, determined agency qualifications, identified priorities, undertaken a series of minigrant projects, and developed plans for the extension of these projects and a study of the organization of the seven member state education agencies. Six minigrant projects were funded and developed: a parent involvement project, a school community relations project, application of futures research in long range planning, management practices for controlling energy costs, a coordinated comprehensive system for management of basic skills, and application of microprocessors in the schools. Future priorities for consideration, as addressed by state agency chiefs, call for appropriate decision roles for parents in schools, management measures of energy efficiency and effectiveness, strengthening of building management capabilities, experiential equity for rural populations, reinforcement of school board decision making powers and skills, interstate regional futures planning, local and state management and moral inventories, extension of the education continuum, a reexamination of the labor intensive pattern of school personnel utilization, and an emphasis on quality in school programs. (RAA)

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Northeast Regional Education Planning Project

Final Report

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National Institute of Education

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History of the Planning Project

Background

In 1976, NIE established the Research and Development Exchange (RDx). The RDx consisted of seven Regional Exchanges whose primary clients are the SEAs. Each Rx was housed in one of the Regional Education Laboratories and served the same region that the lab served. With the exception of the seven northeastern states, all of the states in the nation were served in some capacity by a Regional Exchange.

Because the Chief State School Officers and their staffs of the seven northeastern states perceived the Rx services to be valuable to their agencies, a group was established to pursue developing a Rx to serve the Northeast. The group consisted of SEA personnel from each of the seven states. Their time was contributed by each of their respective SEAs. The group, called the Steering Committee, met and wrote a proposal to NIE for the funding of a planning project to establish a Rx in the Northeast. The proposal was funded in April of 1979. The Regents Research Fund of the University of the State of New York acted as fiscal agent for the Project.

A project director, Carol Reisinger and a project staff, Jean Stripinis and Susan Mahoney, were hired. Major activities began in July of 1979.

One unique facet of the planning project was the location. The project was housed in the U.S. Office of Education Region I office in Boston. Dr. Thomas J. Burns, the Regional Commissioner, offered facility and equipment to the project. This housing arrangement made it possible for the planning project staff to coordinate activities with the Region I

staff. Each staff was able to identify activities which would be useful to the other and which could be coordinated. It should be noted that such an arrangement is unique.

The Steering Committee and the project staff were faced with a unique situation. First the existing regional exchange network was developed with a lab and then entered into collaborative planning with SEAs with which that lab already had some relationships. In the Northeast there were currently no labs from which to merge such relationships. Secondly, the client group of the Northeast Regional Exchange, the Northeast SEAs, were coming together to develop or to identify organization(s) which could perform Rx functions for them. Thus, there were no Northeast models for Rx service delivery in place nor were there precedents or organizational structures set. Thirdly, the Northeast planning group was not seeking modification or expansion of a workscope for an extant organization, rather they faced the task of formulating a Rx to be directly responsive to their expressed needs and priorities.

Initial Activities - Needs and Regional Qualifications

Project activities began on two levels, (1) an immediate needs sensing of the seven SEAs was made based on existing studies and reviews which had been developed independently in each state prior to 1980, (2) the development of an instrument which would collect information on agencies' qualifications to serve a region.

The needs sensing consisted of interviews with the chiefs and with SEA personnel and reading one to five-year state plans, chiefs' speeches, board priorities and education committee reviews. These materials were analyzed and then synthesized. Five general major priority areas were discerned. They were:

1. Program Improvement at all levels, emphasizing both specific areas and public accountability for results or lack of results.

2. Equalizing access to and quality of education for all students within state, whether inequality has resulted from racial, sexual or other kinds of discrimination, or from inequality of funding among districts.

3. Improvement of management at local and state level.
4. Improved community school relationships.
5. Improvement of teacher training, both pre and in-service.

The Steering Committee took the general priority statements back to their chiefs and narrowed them to workable statements. It was from these statements that the topics for the mini-grants were chosen.

The development of a qualification instrument was a more complex task. A major difficulty was that there was no information on qualities (or characteristics) a service agency should have to be able to serve a region. The project staff spent considerable time researching material on regional services. Few characteristics or qualifications for regional services were identified

in the literature. Moreover, those that were identified had no recommendations as to what might work best in a region. "What kind of regional organization works at all, or best, is simply unknown." [1] Gleaning what they could from the literature, from interviews with regional services staff and from regional services clients, the staff developed a Request for Qualifications (RFQ) form which would enable them to look closely at service agencies in the Northeast region. (See Appendix 1) The instrument was disseminated throughout the Northeast region. Over sixty agencies responded to the RFQ. (See Appendix 2 for catalogue of respondents.)

A secondary outcome of the development of the RFQ was that several agencies called to indicate that the RFQ was an excellent framework for planning. One agency in the region used it as an outline to present information to the public. (A recommendation is that NIE use the RFQ to consolidate like information about service agencies that they fund).

After the needs statements were completed and the RFQ was developed, the project staff and the Steering Committee narrowed the needs statements to more sharply defined issues. From these issues Request for Proposals could be written. The RFPs and the services received from these projects were to serve several purposes (1) to provide some exchange-like services to the SEAs during the planning year, (2) to provide examples of a variety of agencies serving a region in order that the staff could examine characteristics and styles, and (3) to provide examples of processes to serve regions.

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1. Michael Radnor, Robert Rich and Durward Hofler, Regionalism in Educational R/D and I: A Policy Analysis for the National Institute of Education (Evanston, Illinois: Center for the Interdisciplinary Study of Science and Technology, Northwestern University, December 1977) p. 79.

RFPs were released in six program areas (1) Basic Skills, (2) Microprocessors in education, (3) Energy, (4) Futures in education, (5) Community-School Relationships, (6) Parent Involvement in Schools. In addition, an RFP was released for documentation of the six mini-projects. (See Appendix 3). The Steering Committee and outside experts read the proposals that were submitted.

The Organization of the Minigrant Programs

From the initial request for qualifications, the scope and range of the minigrant projects was severely circumscribed. With between $5,000 and $6,000 available for any single project, clearly responses to the RFPs had to have a backlog of experience - in training, research, documentation, or dissemination in the specialty area involved.

The Rx projects were add-ons to pre-existing research and development capabilities demonstrated in the project proposals. No contractor expected to be fully reimbursed for all the research, creation of new knowledge, development of new materials, and training or technical assistance described in their proposals. Universally, the final projects exceeded the scope: each produced reports, training, and/or manuals which exceeded the Planning Program's initial expectations.

The six minigrants, agencies involved, and subjects addressed, included the following:

- o The Parent Involvement Project, based at the Education Development Center in Newton, Massachusetts, which conducted a planning workshop and produced a comprehensive report;

- o The School-Community Relations Project, based at the Horace Mann Lincoln Institute of Columbia Teachers College, in New York, which conducted an awareness workshop and produced a survey of exemplary programs in the region;

- o Applications of Futures Research in Long Range Planning, based at the Institute for Futures Systems Research, Freeville, New York, which conducted a demonstration workshop and produced a survey of current applications and a manual for further workshops;

- o Management Practices for Controlling Energy Costs, based at the Rhode Island Collaborative Effort, Providence, Rhode Island, which conducted a demonstration workshop, and produced an Energy Management Catalogue and a curricular resources catalogue in energy;

- o Coordinated Comprehensive System for Management of Basic Skills, based at The Network, Andover, Massachusetts, which conducted a demonstration workshop and produced a comprehensive workshop manual for further replication;

- o Application of Microprocessors in the Schools, based at the Technical Education Research Center, Cambridge, Massachusetts, which produced a state of the art report on curricular applications of microprocessors in elementary schools.

(One set of minigrant products was sent with implementation proposal.)

Together, these projects produced an extraordinarily rich variety of substantive services, reports, and manuals for a total funding level of less than $40,000. Capitalizing on the unique capacities of these research organizations, the Regional Planning Project provided the opportunity for contractors to establish a new track record in services to SEAs in the region, and thus to demonstrate, to SEAs as well as to the research organizations themselves, relevant applications of research knowledge.

Contractors were chosen through an exhaustive and selective process from RFQ through proposal solicitations, and were encouraged to contribute expertise above the funding level in order to gain credibility in developing later, and probably larger, research applications to a network of SEAs which had, in turn, demonstrated their readiness to use research in improving practice, equity, and increasing efficiency.

The minigrants demonstrated that new knowledge was available in the region; that new knowledge could be applied to real situations; and that that application was an appropriate match of regional resources to regional needs. In addition, the minigrants demonstrated that with the presence of an intermediate agency, and the commitment of resource producers, a vast amount of quality work can be done for a minimum amount of money. That is not to say that the minigrant budgets were ideal, but rather the projects were realistically tied to ongoing processes or research and development.

Outputs and Learnings from the Mini-Projects

Though the mini-grants were designed to provide information about exchange processes, major substantive outcomes were recognized. These outcomes from the mini-projects exemplify the kinds of services and support that can be used by schools to provide more effective education. The following list describes some of these outcomes.

The Parent Involvement project identified model programs and resources for getting parents involved in schools. A workshop was designed to encourage parental involvement and methods of replication for SEA personnel were developed.

The School Community Relations project indexed available programs in the region. It clarified the richness of regional resources in the Northeast and referred interested LEA and SEA personnel to those resources. In addition, an annotated bibliography on school-community relationships was developed.

The Applications of Futures research project developed a replicable workshop for using futures research in medium and long-term planning. The project identified potential relevance of futures planning to particular LEAs and SEAs. A training manual provided methods and included a bibliography and research articles.

The Energy project indexed regional resources in energy in two areas: (1) actual management including TA from non-educational agencies as well as educational agencies; and (2) curriculum resources at local level throughout the region.

The Basic skills project concentrated on writing. It indexed all state legislation relevant to basic skills and thus highlighted the different need for training in each state. The project developed a workshop for training SEA staff on aiding LEAs to manage basic skills. A manual with implementation plans and other resources was provided.

The Micro-processor project indexed programs and policies dealing with micro-processors in each state. It indexed the hardware and software available for use in schools. This index is the first such regional index ever developed. A major discovery from this project is that many LEAs are moving forward in the area of micro-processors and neither SEAs or the federal agencies are equipped to provide major support currently.

Besides funding the six minigrants for services, the Planning Project also contracted for documentation services, to Document Development, Inc. of Brookline, Massachusetts. The DDI report is appended to the implementation proposal, and describes the minigrants in some detail, documenting the process of selection, the range of services provided, and the management capacities developed among the SEA members of the Northeast Regional Education Planning Project.

In terms of a Regional Exchange, three major outputs of the minigrant program are most salient. First, the program as a whole demonstrated the feasibility of interstate collaboration across this diverse region. The minigrant workshops involved SEA, and occasionally LEA participants, always from several states, in some cases from all states. The selection process included the entire Steering Committee, and therefore all seven states, equally. The minigrant contractors had occasion to contact each of the SEAs, and involve significant SEA participation in identifying exemplary programs, reviewing relevant research, recruiting participants in workshops, and/or reviewing increasingly refined drafts of reports. Each of the seven states was served, some with several programs of specific relevance, but each to the satisfication of SEA participants.

Second, the program demonstrated the relevance of training and technical assistance in advanced research fields to the operational needs of SEA and LEA participants. Several minigrants appeared rather abstract to participants future studies and energy curriculum, for example - while other subjects appeared rather specific and narrow in focus - microprocessing, for example and still others seemed to overlap with existing resources in SEAs - on parent and community involvement. Yet each responded to a real

need expressed by more than one SEA for state-of-the-art knowledge, and each provided that knowledge in a workable and useful form. Studies of knowledge utilization indicate that the real measure of relevance is not possible until SEA and LEA participants apply that knowledge in their home context, however, the general conclusion of the workshop participants and materials reviewers was supportive and positive.

Third, the program demonstrated a complementarity of materials production with training, of documents with process. This, perhaps, is the most interesting and pregnant of these outputs, for it highlights an activity which is central to any Regional Exchange. It is not important for an intermediary agency to replicate, exactly, the training provided by the research organizations. It is necessary that they understand the knowledge and research findings, and that they conceive of realistic applications for such learning, in terms of improved practice, improved equity, and increased efficiency.

By involving SEA personnel throughout the minigrant twelve week cycle, SEA personnel were feeding forward to research agencies the subtleties of needs summarized in the RFPs. Research agencies were adapting, revising, and fine tuning their research knowledge to respond to those needs. Since all of this dialogue was also inter-state, with SEAs participating across boundaries of subject area specialties, of rank, and of states, the Exchange, as an exchange, was guaranteed success. In continuing this process, and in fact in institutionalizing this process, this approach is profoundly responsive to national priorities, if unique in its level, scope, and style of involvement.

Problems Anticipated and Solutions Proposed

The minigrant program was not without problems. Each of the problems identified by the documentation suggest both the complexity of interstate and interorganizational collaboration, often noted in the literature, and the promise of effective collaboration in solving those problems.

The key problem identified was a variation among the states in the degree of support - management support, travel support, and support of internal communications - provided to the research organizations. This variation was anticipated, given the range in size of SEAs, the range of problems addressed by those SEAs, the range of budgetary limitations (on interstate or intrastate travel, for example), or the range of qualified and/or specialized staff available. The solution to this problem appears distressingly simple: the active and continued involvement of the Chief State School Officers themselves, as both a policy and program Board of Directors.

Several other problems occurred. Not all SEAs felt a need addressed by a mini-grant. This problem reflects the short time frame of the needs assessment and the diversity of the SEAs themselves. A partial solution is a multi-dimensional needs sensing system. Such a solution does achieve a unique blend in that, for the Northeast Regional Exchange, SEAs are mutually accountable for their priorities.

Most other problems encountered in the mini-grant program can be re-framed as parts of the general solution. The problem the contracts encountered, of too short a time frame, highlights the opportunity SEAs now

encounter, to shorten the span between research conclusions and practical applications. The problem several SEA participants encountered, of a continuing conflict between compliance enforcement and technical assistance roles, becomes a resource for researchers seeking research oriented questions with practice oriented conclusions. Two of the minigrant projects were particularly responsive to this problem, incidentally, and between them may have offered the source for a continuing solution to this SEA internal conflict. The Network's program in basic skills was focused on training managers in selected LEAs to comply with SEA mandates, and was therefore directly responsive to SEA compliance roles through a replicable technical assistance service. DDI's documentator contract, relieving the Regional Planning Project of compliance responsibilities, demonstrated at least one feasible strategy to clarify technical assistance as a service and supervisory role for central management.

This review of the problems encountered in a pilot phase does not mean that additional problems will not be encountered in installing a Regional Exchange based upon this experience. It does indicate, however, that the state sponsors of that Exchange are eager for the challenge of such problems, and have the organizational resources to respond to problems as they arise.

Further Approaches

During the mini-grant process, the Rx planning grant staff was continuing to research regional service agencies and their methods. Two

short studies were completed. One study was a comparison of the seven Rxs and their "parent" laboratories. This study compared budgets, governance, staffing, facilities, and evaluation processes. (See appendix 4 for full report).

The second study was a direct reflection of an emphasis outlined by the Steering Committee. They cited, as a major problem of agencies serving the SEAs, the improvement of methods for getting SEA needs. Therefore, a study of current needs sensing approaches at the institutional and programmatic level was completed. This study emphasized needs sensing by the Regional Labs and by the Rxs. (See appendix 5 for complete paper).

In addition to completing the studies, the staff was looking at regional service designs, governance structures, staffing, and service models. Simultaneously, the mini-projects were coming to an end.

The staff prepared an issues paper for the Steering Committee to discuss with their Chiefs. The paper described four design models, several governance structures, possible services, and dealt with the issues of agency selection. (See appendix 6 for issue paper). Each Steering Committee member met with his/her chief and solicited the Chief's thinking on the issues.

The Committee members then met with the staff to describe their Chiefs' decisions on the issues. A consensus was determined on the basis of the Chiefs' decisions and on staff and Steering Committee input.

It was during this time that an exciting acitivity occurred. The seven Chiefs were meeting in Washington at an annual conference. A special breakfast was called by the seven Chiefs for the purpose of discussing the regional exchange and other regional issues. This was the first time that the seven Chiefs had come together to discuss such issues and the catalyst for the meeting was the exchange. There can be no question as to the importance the Chiefs placed on the development of a regional exchange for the Northeast!

A second meeting of the Chiefs was scheduled for the purpose of making final decisions about the exchange. These decisions were to be presented in the proposal to NIE.

The staff prepared a second decision paper for the Chiefs. (See appendix 7). At the meeting, the Chiefs discussed the issues and the decisions to be made. The original proposal is a direct result of the decisions arrived at by those seven Chief State School Officers from the Northeast Region.

During the meeting the chiefs discussed regional priorities. They set out a list of areas in which they would like to see regional services provided. Each topic is briefly stated, and then described in terms expressed by the Chiefs themselves.

- Appropriate decision roles for parents in schools: responding to the needs to reallocate staff, to justify budgets in terms of staff productivity, and to maintain credible contracts with teacher organizations; to constraints of facilities and to opportunities to serve new constituencies - the elderly, the underemployed, or employed but transitional adults;

- Management measures of energy efficiency and effectiveness; responding to the budgetary and public interest need to regulate energy utilization, as well as to the unrecognized experience of Northeastern institutions that winter scheduling is energy efficient (e.g. a Middlebury College study); that school transportation might serve additional constituencies; and that school board purchasing power might alleviate energy costs;

- Strengthening building management capabilities: responding to changing roles of principal and building managers in unionized situations; to the need to develop union leaders as educational leaders; and to unrecognized leadership training programs for highly selective leadership training (e.g., in Maine) with a potential replication in other states;

- Experiential equity and rural isolation: responding to the cultural, social, educational, and psychological isolation of rural populations as inequitably served by their limited environments with increased physical mobility for rural leaders, media access through cable or rural broadcast, and reinforced field agent roles, perhaps across different social or human service providers;

- Reinforcing School Board decision making powers and skills; responding to lay direction of professional activities with creative and involving decision training, documentation and models of improved practice, equity, and increased efficiency in and outside of the region, addressed specifically to School Board members;

- Interstate regional futures planning; responding to the unique regional characteristics of the Northeast, e.g., labor intensive, concentration of human capital, poverty of natural resources; and more effective linking with economic development resources for educational productivity, e.g., New England Regional Commission (Department of Commerce), Departments of Labor, Transportation, Energy, and Housing and Urban Development interstate consortia, etc. through shared state plans in these and other education related areas;

- LEA and SEA management and morale inventories: responding to the institutional climate of education (under siege), the combined forces of career immobility, limited access to other, more lucrative and prestigious professions, and declining income equity with other professions;

- Extending the education continuum: responding to pressures for more effective pre-school services and more involving services to elders, in part to respond to the political constituency not previously served and critical to the passage of school budgets, in part to extend individualized educational plans to increasingly younger and less disabled, more main-stream clients;

- Reexamination of the Labor Intensive pattern of school personnel utilization: responding to the need to re-evaluate staff allocation, and class size, and to review the technological potential of alternative staffing patterns, more or broader or better links with other human services equally labor intensive, and revised community service patterns including educational professionals with other professions.

- Stressing quality of school programs: focusing on curriculum, methods of instruction and quality of professional staff.

These topics, clearly, span a scope and breadth broader than a single year's program, broader, perhaps, than the research organizations' capacity to respond. In fact, these topics illustrate the potential to provide information to developers and researchers by the educational leaders of seven states.

Extension of Mini-Services

Prior to the end of the grant year (June, 1980), it was suggested that the NREPP request a four-month extension for the purposes of maintaining the Project and keeping networks alive while NIE was debating the virtues of the implementation proposal.

Several other activities were designed to be carried on during the four-month extension period. These activities were designed to complement the mini-grants that had been funded during the primary funding period.

Four of the original six grantees were contracted for additional activities. These were:

1. Rhode Island Collaborative Effort (RICE)

RICE collaborated in a presentation entitled "Energy Conservation Programs in Small School Districts" on September 24, 1980, with the Massachusetts Department of Education. The workshop was attended by approximately 30 participants (see appendix 8 for program and participant list). RICE has also revised and reprinted 100 copies of its "Energy Management Catalogue" (see Appendix 9), and has distributed the copies to key personnel in the seven regional SEAs.

2. Technical Education Research Centers (TERC)

TERC has rewritten and reprinted 500 copies of its report entitled "Microcomputers in Education" (see Appendix 10). Of the 500 copies, 250 have been distributed to SEA personnel and 250 were retained by TERC for distribution upon request. The report has proved so popular that the stock is already very low.

3. Education Development Center (EDC)

As of this writing, negotiations are still underway for the presentation by EDC of in-service training programs for SEA personnel concerning SEA facilitation of parental involvement in the schools. Postponement

of this presentation was necessitated because of the difficulty of scheduling a presentation during the months of September and October, when SEA personnel are at their busiest, as well as coordinating these schedules with those of presenters and directors of the mini-grant projects.

4. The Network

The Network has completed a revision of its workbook entitled "Improving Writing Skills", and has presented the NREPP with 20 copies for distribution (See Appendix 11).

Preparation for SEA Organizational Study

Lewis Rhodes, of Applied Management Sciences, was approached to write the organizational/functional study of the seven SEAs in our region. Mr. Rhodes attended a meeting of the steering committee, held on September 11-12, 1980, in order to plan the study. It became apparent that an attempt to complete the study within the given time and budget would have yielded results that would have been so superficial as to be useless. It was felt that in order to be useful, such a study needed to be more clearly defined as to purpose and scope. Thus it was determined that Mr. Rhodes should write a preliminary issues paper designed to facilitate decision-making by the SEA policy-makers.

The purpose of the larger study was to identify "pitchers" and "catchers" within the SEAs, in order to maximize the effectiveness of an Rx-like organization. But a basic organizational fact of life is that program specialists within the SEAs tend to see themselves primarily as "pitchers", and may be reluctant to cast themselves in the role of "catchers". The issues paper suggests ways to encourage greater receptiveness on the part of SEA personnel (See Appendix 12).

Miscellaneous Activities

In the revised extension proposal, we discussed the problems of regional needs-sensing. In our meeting with the seven Chiefs on June 8-9, it was clearly indicated that among the most pressing "needs" of the SEAs are to fulfill the objectives set by the State Boards of Education and expressed in state long-range plans. It was felt that an extremely simple way to begin to crystallize regional priorities would be to share these long range plans among the states. The NREPP staff therefore collected these plans and goals statements and distributed them to the other states within the region.

As described on pages 3 and 4 of this report, one of the major activities during the first month of full operation of the Project was the design and distribution of the RFQ. Beyond its immediate purpose (selecting agencies to receive the RFPs for mini-services), it was felt that the responses to the RFQ could be usefully organized into a catalogue of service agencies, containing the information about agency structure, governance and purpose which the RFQ was designed to elicit. Therefore, the four-month period has been partly devoted to editing and compiling those responses for reprinting in catalogue form (see Appendix 2).

It has been suggested, by NIE staff and others, that it would be wise for the Board of Directors of the proposed Regional Exchange to incorporate. Because there were questions about the procedures involved, and the choice of state of incorporation, the NREPP staff prepared a summary of procedures of incorporation in each of the seven states, together with recommendations (see Appendix 13).

Other activities continued. Despite our small staff and the difficulties of bulk mailing, storage and delivery, we have attempted to organize some of the diverse materials which have flowed into the office, and to distribute them both within and outside of the region upon request, or whenever we were aware of a person or program which might benefit from materials sent to us.

We have also acted as facilitators in responding to surveys conducted by other agencies, such as the survey of state validation procedures conducted by CEMREL, the directory of state reading contact people compiled by RBS, and the survey conducted by RRS on the use and suggestions for updating its Mini-lists.

The Project Director has continued to lend her expertise as a trainer, speaker and advisor, at national, regional and local conferences, workshops and in-service training sessions. For example, at the request of the Vermont Department of Education, she conducted two training sessions, one designed to train RAP agents to help build a state consultant file, and another to advise the Department on state validation procedures.

A less tangible activity, but perhaps the most valuable of all, has been the continuing effort to build and strengthen the networks, both formal and informal, which would be the crux of a successful Regional Exchange. Although some of the informal networks, based upon personal relationships

and a history of mutual trust and respect, may depend partly upon these personal factors for their continued strength, we feel that a basic framework as well as an attitude of regional cooperation has been established and will survive the current staff and steering committee.